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SUGAR REPORTS

U. S. DEPARTMENT OF AGRICULTURE • PRODUCTION AND MARKETING ADMINISTRATION • SUGAR BRANCH

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Approved by the Outlook and Situation Board

SUGAR DISTRIBUTION BY MONTHS 1949 ACTUAL AND ADJUSTED TO SEASONAL BASIS AND JANUARY-SEPTEMBER, 1950 ACTUAL



U. S. DEPARTMENT OF AGRICULTURE

PRODUCTION AND MARKETING ADMINISTRATION

FIGURE I

Even though sugar distribution in July generally is seasonally high, the quantity distributed in July 1950 was unusually high. Following the outbreak of hostilities in Korea, purchases of sugar were made by various buyers in excess of normal needs. The chart above shows a comparison of sugar distribution through September 1950 with the actual distribution in 1949 and with 1949 distribution adjusted for seasonal fluctuations. The seasonal pattern was developed from data covering sugar distribution in the years 1935, 1936, 1938, 1940, 1948 and 1949.

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SEASONAL DISTRIBUTION OF
SUGAR

The distribution of sugar is influenced by a number of market factors and the pattern of distribution in any series of years is not necessarily normal. However, sugar distribution tends to be higher in the summer months than in any other periods of the year. Distribution in July 1950 was unusually high even after allowance is made for the fact that July is usually a month of high distribution.

To provide a guide for the measurement of the seasonal fluctuations of sugar distribution, the prewar years of 1935, 1936, 1938 and 1940 were selected for the development of a measure of seasonal variations. The distribution pattern developed from the use of these four years appeared in SUGAR REPORTS No. 1. The year 1937 was eliminated from the series because unusually high distribution preceded the imposition of an excise tax in September of that year. The outbreak of the war influenced appreciably the distribution of sugar in 1939. The year 1941 was not used because distribution was exceptionally high due to the war, expected higher prices and possible shortages.

Data for 1948 and 1949, the first two years following the decontrol of sugar, have now been added to the data to reflect the change that appears to have taken place in seasonal distribution. Moreover, the larger number of years, six, eliminates some of the month-to-month fluctuations that existed in the earlier calculations based on four years.

The seasonal pattern was determined by totalling distribution for the same month in each of the six years 1935, 1936, 1938, 1940, 1948 and 1949, then dividing by six to determine the average distribution in that month. Each of these average monthly distribution figures was then converted to a percentage of the annual average. Resulting monthly percentages are as follows:

January	6.1	May	8.2	September	9.5
February	6.7	June	9.5	October	7.9
March	8.0	July	10.0	November	7.6
April	8.4	August	9.9	December	8.2

Table 1 shows actual sugar distribution by months during 1949 and also the total distribution for the year adjusted to a seasonal basis. Distribution during January-September 1950 is also shown in the table.

**Table 1 MONTHLY DISTRIBUTION OF SUGAR BY PRIMARY DISTRIBUTORS
FOR U.S. CONSUMPTION, 1949 ACTUAL AND ADJUSTED TO SEASONAL BASIS
AND JAN.-SEPT. 1950 ACTUAL**
(short tons, raw value)

Month	Actual 1950	Actual	1949
			Adjusted to seasonal basis
January	508,537	558,518	462,394
February	501,508	498,748	507,875
March	618,495	615,055	606,418
April	565,226	537,248	636,739
May	735,153	601,337	621,579
June	860,136	790,135	720,121
July	1,188,091	745,232	758,022
August	944,257	922,618	750,442
September	652,187 *	726,842	720,121
January - September	6,573,590 *	5,995,733	5,783,711
October		523,382	598,838
November		537,387	576,097
December		523,723	621,579
TOTAL		7,580,225	7,580,225

* Preliminary

**DISTRIBUTION OF SUGAR BY TYPE OF PRIMARY DISTRIBUTOR -
JANUARY-SEPTEMBER 1950**

Total distribution of sugar by cane refiners, beet processors and importers of direct-consumption sugar exceeded that recorded by these types of primary distributors in comparable 9-month periods of 1949 and 1948. Distribution by mainland cane mills in the first 9 months of 1950 was less than in January-September of either 1949 or 1948. The detail of the distribution of sugar by each type of primary distributor for comparable periods is shown in Table 2.

**Table 2 DISTRIBUTION OF SUGAR BY PRIMARY DISTRIBUTORS IN THE CONTINENTAL
UNITED STATES**

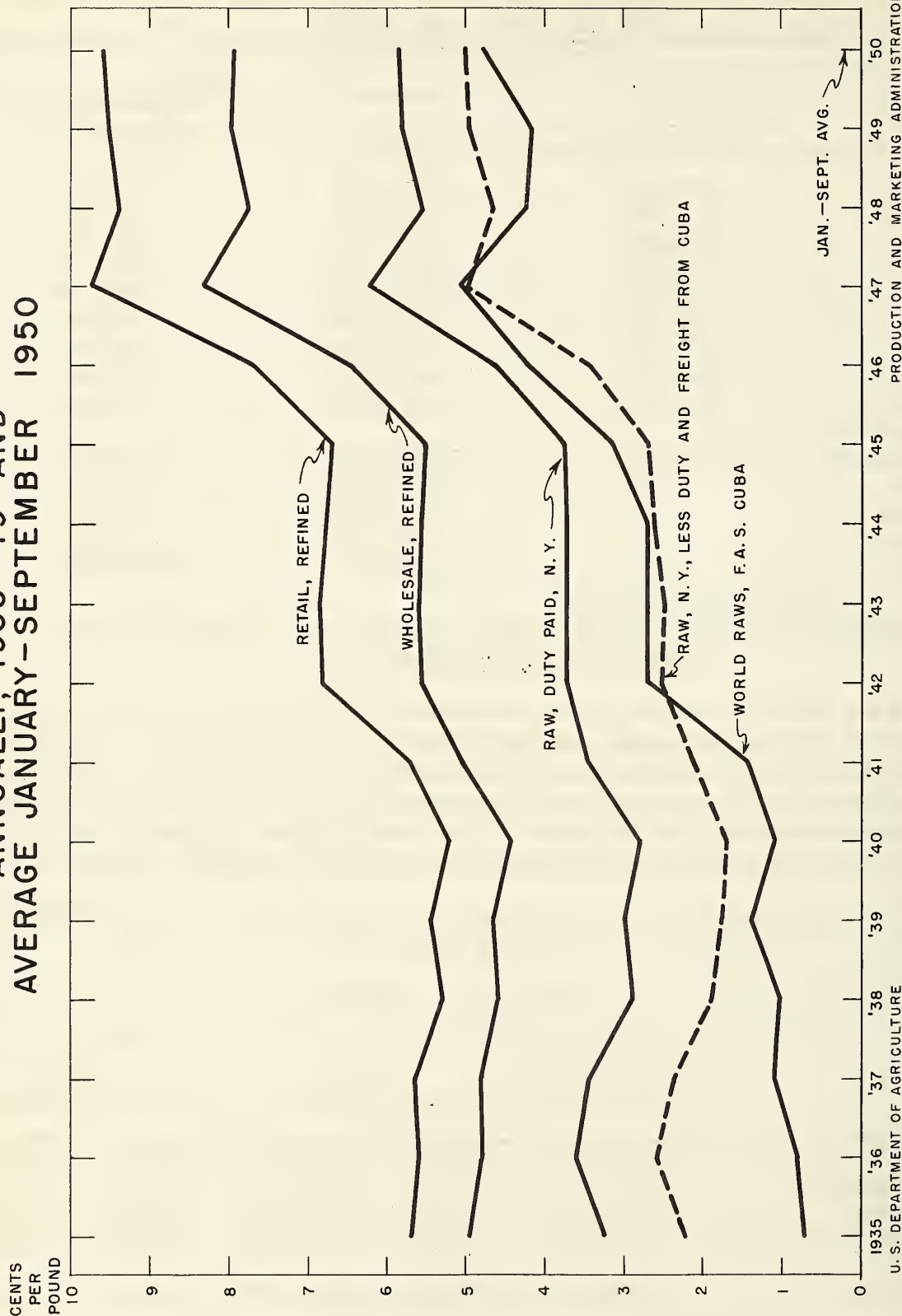
(short tons- raw value)

	1950 1/	1949		1948	
	Jan.-Sept.	Jan.-Sept.	Jan.-Dec.	Jan.-Sept.	Jan.-Dec.
Refiners	4,683,343	4,382,335	5,487,940	3,946,953	5,154,160
Beet processors	1,353,711	1,148,697	1,486,889	1,311,910	1,656,663
Importers	517,338	440,574	514,430	422,516	511,693
Mainland cane mills	42,081	58,856	134,708	54,628	97,707
Total	6,596,473	6,030,462	7,623,967	5,736,007	7,420,223
Deliveries for export	22,883	34,729	43,742	53,065	77,300
For U.S. Consumption	2/6,573,590	5,995,733	7,580,225	5,682,942	7,342,923

1/ Preliminary

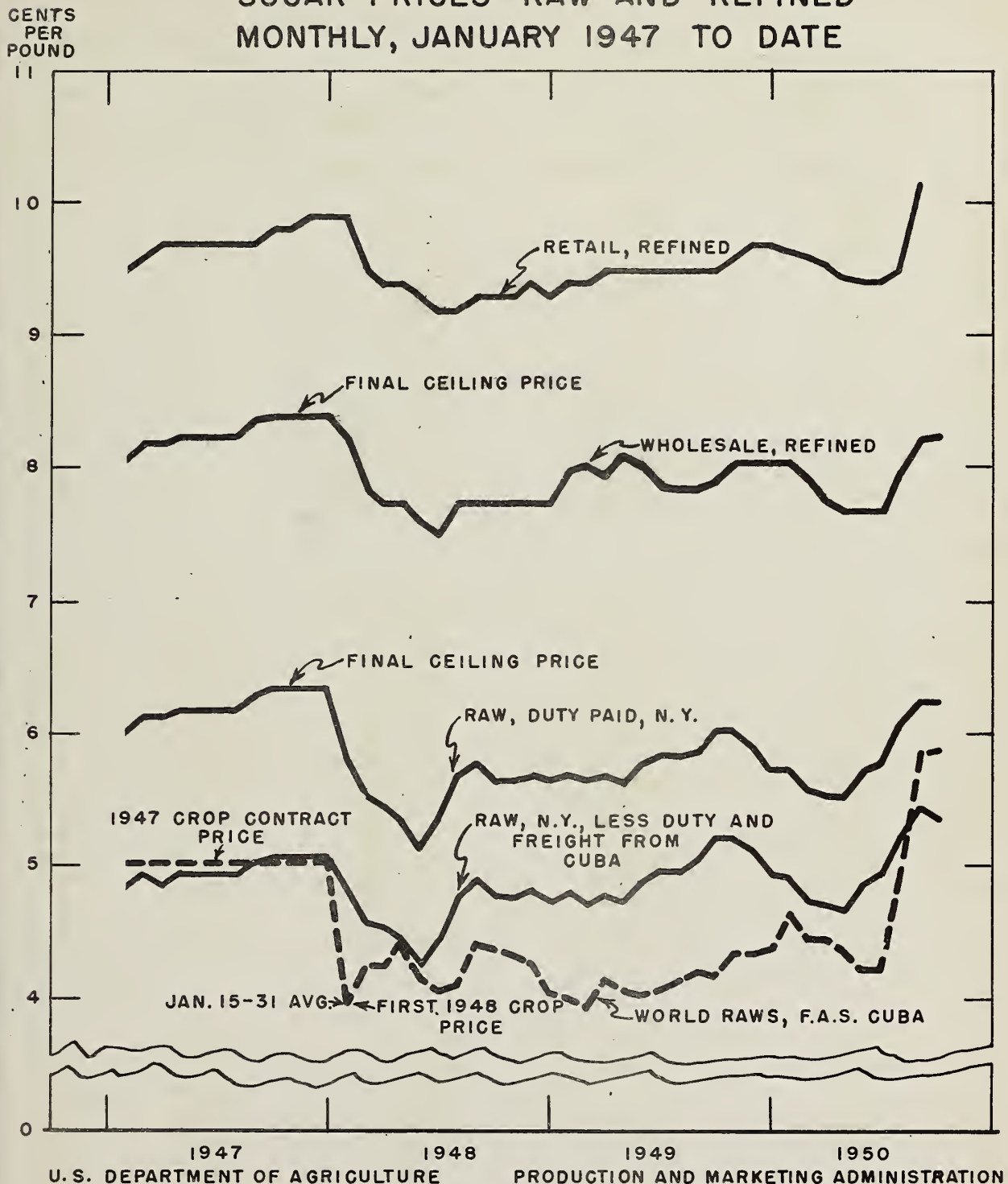
2/ Includes deliveries for U. S. Military Forces at home and abroad.

SUGAR PRICES—RAW AND REFINED ANNUALLY, 1935-49 AND AVERAGE JANUARY-SEPTEMBER 1950



The world price of raw sugar since the war has been between 4 and 5 times its prewar level. Prices in the domestic market are 84 percent higher at retail and 73 percent higher at wholesale than they were from 1935 through 1939. During the war and early postwar period the domestic price of raw sugar less duty and freight from Cuba was less than the price paid Cuba.

SUGAR PRICES—RAW AND REFINED MONTHLY, JANUARY 1947 TO DATE



During the two months following the outbreak of fighting in Korea sugar prices rose more at retail than at wholesale in the United States. The greatest rise was in the world price of raw sugar, which during September was 1/2 cent per pound over the Cuban equivalent of the United States raw sugar price.

Table 3 SUGAR PRICES, RAW AND REFINED - ANNUALLY 1935-1949 AND
MONTHLY, JANUARY 1947 - SEPTEMBER 1950

Period	RAW SUGAR			REFINED SUGAR	
	New York, ^{1/} Duty paid _{1/}	New York, less duty and freight from Cuba (compu- ted price) _{2/}	World, f.a.s. Cuba _{5/}	Wholesale, New York, with tax _{6/}	Retail, large cities _{7/}
1935	3.24	2.22	.876	4.95	5.67
1936	3.61	2.58	.862	4.79	5.59
1937	3.45	2.36	1.129	4.82	5.64
1938	2.93	1.89	1.004	4.57	5.30
1939	3.00	1.76	1.427	4.56	5.43
1940	2.80	1.68	1.109	4.42	5.20
1941	3.41	2.12	1.463	5.02	5.71
1942	3.74	2.48 <u>3/</u>	2.686 <u>3/</u>	5.56	6.82
1943	3.74	2.46 <u>3/</u>	2.636 <u>3/</u>	5.60	6.83
1944	3.74	2.59 <u>3/</u>	2.686 <u>3/</u>	5.57	6.76
1945	3.75	2.65 <u>3/</u>	3.141 <u>3/</u>	5.50	6.88
1946	4.62	3.43 <u>3/</u>	4.24 <u>3/</u>	6.47	7.68
<u>1947</u>					
Jan.	6.03	4.85 <u>3/</u>	5.03 <u>3/</u>	8.09	9.5
Feb.	6.12	4.93 <u>3/</u>	5.03 <u>3/</u>	8.20	9.6
March	6.12	4.89 <u>3/</u>	5.03 <u>3/</u>	8.20	9.7
Apr.	6.18	4.93 <u>3/</u>	5.03 <u>3/</u>	8.24	9.7
May	6.18	4.93 <u>3/</u>	5.03 <u>3/</u>	8.24	9.7
June	6.18	4.93 <u>3/</u>	5.03 <u>3/</u>	8.24	9.7
July	6.18	4.93 <u>3/</u>	5.03 <u>3/</u>	8.24	9.7
Aug.	6.29	5.04 <u>3/</u>	5.03 <u>3/</u>	8.38	9.7
Sept.	6.32	5.07 <u>3/</u>	5.03 <u>3/</u>	8.40	9.8
Oct.	6.32	5.07 <u>3/</u>	5.03 <u>3/</u>	8.40	9.8
Nov.	6.32	5.07 <u>3/</u>	5.03 <u>3/</u>	8.40	9.9
Dec.	6.32	5.07 <u>3/</u>	5.03 <u>3/</u>	8.40	9.9
Year	6.21	4.98 <u>3/</u>	5.03 <u>3/</u>	8.29	9.72
<u>1948</u>					
Jan.	5.83	4.86	3.96	8.21	9.9
Feb.	5.52	4.59	4.24	7.82	9.5
March	5.45	4.54	4.26	7.75	9.4
Apr.	5.55	4.46	4.43	7.75	9.4
May	5.14	4.26	4.27	7.60	9.3
June	5.35	4.46	4.06	7.51	9.2
July	5.69	4.79	4.10	7.75	9.2
Aug.	5.78	4.88	4.41	7.75	9.3
Sept.	5.66	4.79	4.39	7.75	9.3
Oct.	5.35	4.78	4.32	7.75	9.3
Nov.	5.68	4.81	4.27	7.75	9.4
Dec.	5.66	4.73	4.03	7.75	9.3
Year	5.56	4.66	4.23	7.76	9.4

Table 3 (continued)

Period	RAW SUGAR			REFINED SUGAR	
	New York, Duty paid ^{1/}	New York, less duty and freight from Cuba (compu- ted price) ^{2/}	World, f.a.s. Cuba ^{5/}	Wholesale, New York, with tax ^{6/}	Retail, large cities ^{7/}
<u>1949</u>					
Jan.	5.69	4.79	4.00	7.99	9.4
Feb.	5.65	4.73	3.95	8.00	9.4
March	5.68	4.78	4.17	7.96	9.5
Apr.	5.63	4.73	4.09	8.10	9.5
May	5.78	4.89	4.04	8.02	9.5
June	5.86	4.98	4.08	7.87	9.5
July	5.83	4.97	4.13	7.85	9.5
Aug.	5.88	5.06	4.20	7.85	9.5
Sept.	6.01	5.21	4.18	7.90	9.5
Oct.	6.02	5.22	4.33	8.05	9.6
Nov.	5.91	5.13	4.33	8.05	9.7
Dec.	5.74	4.95	4.38	8.05	9.7
Year	5.81	4.95	4.16	7.97	9.5
<u>1950</u>					
Jan.	5.74	4.92	4.02	8.05	9.63
Feb.	5.59	4.76	4.47	7.92	9.60
March	5.54	4.71	4.44	7.74	9.54
Apr.	5.52	4.69	4.37	7.70	9.46
May	5.70	4.88	4.21	7.70	9.42
June	5.78	4.96	4.21	7.70	9.42
July	6.07	5.25	4.89	7.97	9.50
Aug.	6.25	5.42	5.83	8.22	10.14
Sept.	6.25	5.38 ^{4/}	5.88	8.25	10.12
Jan-Sept.					
Average	5.83	5.00	4.77	7.92	9.65

(Footnotes on next page)

Footnotes for Table 3.

- 1/ 1935-41, Lamborn raw sugar prices, c&f New York plus duty; Jan. 1942 - Sept. 1947, World Sugar Situation, BAE, (1948); Oct. 1947 - March 1948, CCC Contract Price to refiners on day of melt (March price is average of CCC Contract Price March 1-16 and market price balance of month); April 1948 - September 1950, New York Coffee & Sugar Exchange.
- 2/ Column 1 prices less duty and freight. Although from May 1944 through December 1946 sugar was entered duty free under Executive Order 9177, for the purpose of this table the then-current rate of duty has been deducted inasmuch as for a substantial portion of this period the duty equivalent was used by CCC to offset its losses due to the spread between the ceiling price and the cost of sugar. Freight rates from Cuba to New York were obtained from the following sources: 1935-47, U.S. Maritime Commission official rates, 1948-June 1950, Lamborn & Co., July-August 1950, Willott & Gray estimates.
- 3/ Prices paid to Cuba for the various crops were as follows: 1942-43-44, 2.65 cents per pound, 1945, 3.10 cents, 1946, 4.1813 cents, 1947, 4.9625 cents.
- 4/ CCC price.
- 5/ Jan. 1935-August 1939, Lamborn & Co. c.i.f. UK (converted to c&f New York) less freight from Cuba to New York, Sept. 1939-Dec. 1941, N.Y. Coffee & Sugar Exchange (converted by Lamborn & Co., to c&f New York, less freight from Cuba to New York); 1942-47 prices are those paid to Cuba by CCC plus CCC's expenses of approximately one percent. Trading began January 15, 1948 on the N.Y. Coffee & Sugar Exchange and January price is average for January 15-31. February 1948-September 1950, N.Y. Coffee & Sugar Exchange.
- 6/ 1935-41, Lamborn & Co., net prices (converted to gross prices); Jan. 1942 - Oct. 1947, ceiling prices; Nov. 1947 - Sept. 1950, Lamborn & Co. Prices subject to two percent discount.
- 7/ Bureau of Labor Statistics, Department of Labor.

PROPOSED US STANDARDS FOR SUGARCANE SIRUPS
AND EDIBLE SUGARCANE MOLASSES

Proposed US standards for sugarcane sirups and edible sugarcane molasses were announced on September 26, 1950. They are designed to encourage production of higher-quality products and to improve their marketability. No US standards have existed for these products. The work of developing the proposed standards was done under authority of the Research and Marketing Act.

Three grades of edible sugarcane molasses are proposed - US fancy, US medium-light and US medium-dark. Sugarcane sirups are divided into sulfured and unsulfured types, depending on whether the sulfitation process is used in their production. Two grades of the sulfured type and three grades of the unsulfured type are proposed. Proposed grade names for the sulfured sirups are US fancy and US good and for the unsulfured sirups are US extra-fancy, US fancy and US good.

The criteria upon which grade specifications for both types of sugarcane sirups and for edible sugarcane molasses are based include differences in total solids content, total sugar, ash and color. For the sulfured type sugarcane sirup and for molasses, content of sulfites is also a quality factor.

In the notice which appeared in the FEDERAL REGISTER of September 26, 1950, all persons who desire to submit written data, views, or arguments for consideration in connection with the proposed standards were requested to file them in duplicate with the Director of the Sugar Branch, Production and Marketing Administration, United States Department of Agriculture, Washington 25, D. C. Copies of the proposed grades and standards may be obtained from the Sugar Branch.

Table 4

WHOLESALE REFINED SUGAR PRICES

QUOTED GROSS PRICES AND JAN. - OCT. 1947 AVERAGE CEILING PRICE
ADJUSTED FOR CHANGES IN CONSUMERS' PRICE INDEX

Period	Quoted price 1/	January - October
		1947 Average Ceiling Price Adjusted for Changes in CPI 2/
<u>1948</u>		
Jan	8.210	8.841
Feb	7.819	8.773
Mar	7.750	8.742
Apr	7.750	8.867
May	7.600	8.930
Jun	7.511	8.993
July	7.750	9.098
Aug	7.750	9.140
Sep	7.750	9.140
Oct	7.750	9.092
Nov	7.750	9.019
Dec	7.750	8.977
<u>1949</u>		
Jan	7.988	8.951
Feb	8.000	8.852
Mar	7.957	8.878
Apr	8.100	8.888
May	8.204	8.862
Jun	7.870	8.883
July	7.850	8.825
Aug	7.850	8.841
Sep	7.898	8.883
Oct	8.050	8.825
Nov	8.050	8.831
Dec	8.050	8.773
<u>1950</u>		
Jan	8.050	8.742
Feb	7.925	8.721
Mar	7.735	8.747
Apr	7.700	8.762
May	7.700	8.831
Jun	7.700	8.914
July	7.970	9.035
Aug	8.224	9.061
Sep	8.250	9.103
Oct	8.250p	na

1/ Subject to 2 percent discount

2/ Jan-Oct. 1947 avg. of wholesale refined prices, N.Y. (8.267¢)
divided by Consumers' Price Index avg. for Jan-Oct. 1947 (157.84)
multiplied by Consumers' Price Index for respective period.

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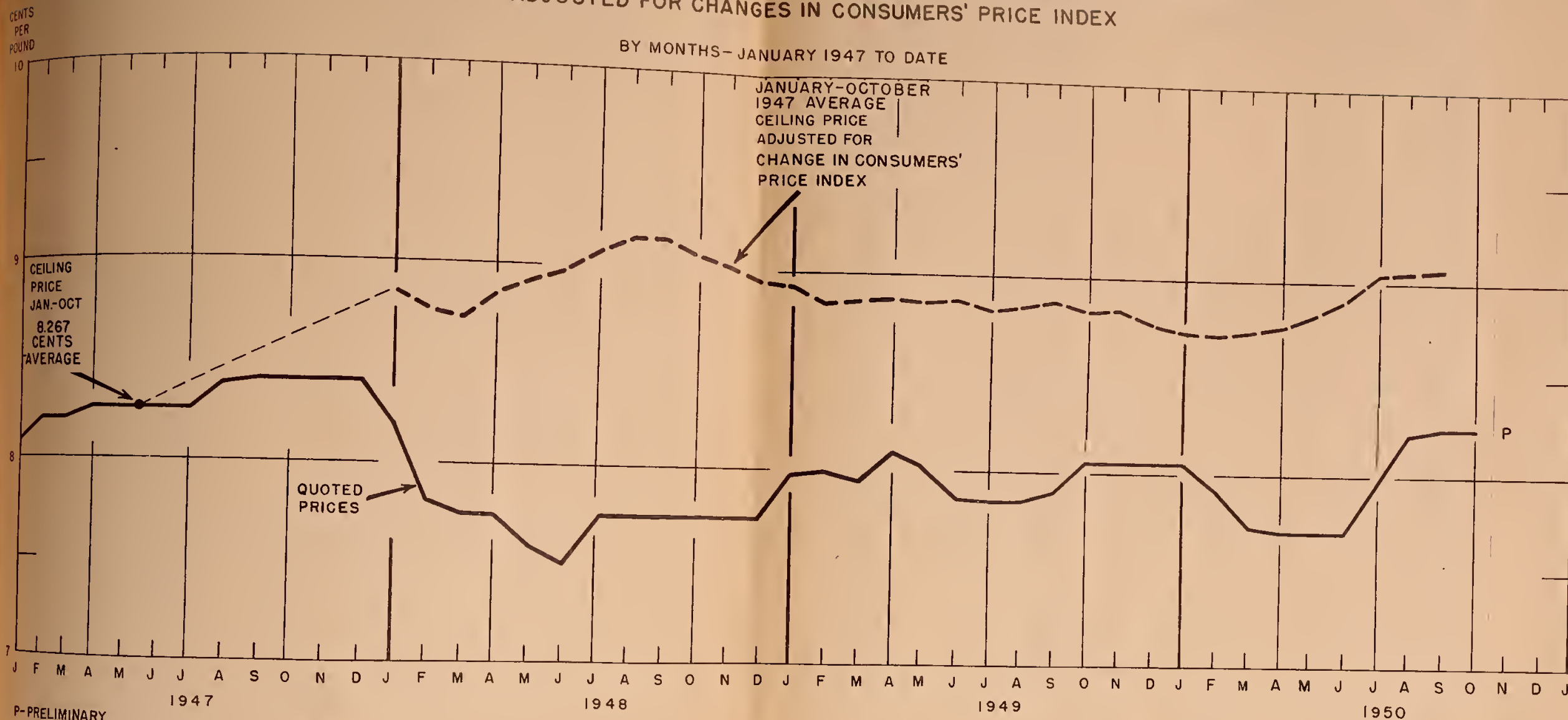
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WHOLESALE REFINED SUGAR PRICES QUOTED GROSS PRICES AND JANUARY-OCTOBER 1947 AVERAGE CEILING PRICE ADJUSTED FOR CHANGES IN CONSUMERS' PRICE INDEX

BY MONTHS - JANUARY 1947 TO DATE

SUGAR REPORTS
 FIGURE IV

OCTOBER 1950



P-PRELIMINARY

U.S. DEPARTMENT OF AGRICULTURE

PRODUCTION AND MARKETING ADMINISTRATION

Sugar prices declined in 1948 while prices of commodities generally were rising.

Although wholesale sugar prices have fluctuated within a range of 0.55 cent per pound in 1949 and 1950, they have not attained the level of commodities generally.

DELIVERIES OF SUGAR, DEXTROSE AND CORN SIRUP
BY TYPE OF BUYER

Sugar, dextrose and corn sirup deliveries by type of buyer for the second quarter and the first six months of 1950 are summarized in Tables 6 through 19. The sugar and dextrose data are collected under a Research and Marketing Act project and the tables represent a continuation of those published in SUGAR REPORTS No. 7 and No. 8.

Total deliveries of crystalline and liquid sugar by type of buyer during the second quarter 1950, were equivalent to 39.3 million bags, refined value.

This was 12.8 percent more than comparable deliveries for the second quarter 1949. Total deliveries of sugar during the first six months 1950, as reported by type of buyer, were 69.2 million bags, refined value, or 6.8 percent higher than the deliveries during the same period 1949.

The greatest increases in sugar deliveries during the second quarter 1950 over the same period of 1949 were in the categories "Canned, bottled, frozen foods, etc." and "Multiple and all other food uses". There was also a strong increase in deliveries to confectioners. "Wholesalers, jobbers, and sugar dealers" showed a large increase in receipts during the second quarter of this year when compared to April-June 1949, reflecting primarily increased deliveries of consumer-size packaged sugar.

Dextrose sales for the second quarter 1950 totaled 1.8 million bags and were 30.9 percent over the same quarter 1949. The sales for the first six months 1950 were 16.2 percent greater than the corresponding period in 1949. Every type of buyer increased his purchases of dextrose during the second quarter 1950 as compared with 1949. Totals for the first six months show increases for this year in all categories except "Beverages" and "Ice cream and dairy products".

Sales of corn sirup (unmixed) for the second quarter 1950 totaled 3.3 million units of 100 pounds each, 7.9 percent above those of 1949. Increases were noted in every category of buyer except "Ice cream and dairy products" and "Brewery and brewery supply houses".

Table 6
SUGAR DELIVERIES, BY TYPE OF PRODUCT OR BUSINESS OF BUYER AND BY TYPE OF SUGAR DELIVERED,
UNITED STATES, SECOND QUARTER, 1950 1/

Product or Business of Buyer	Crystalline			Liquid 3/ (100-lb. equiv.)	Total
	Beet (100-lb. bags)	Cane 2/ (100-lb. bags)	Imported D.C. (100-lb. bags)		
Bakery and allied products, cereals and cereal products	1,088,388	1,894,412	303,431	94,060	3,380,291
Confectionery and related products	731,493	1,570,841	694,443	315,602	3,312,379
Ice cream and dairy products	424,384	681,670	97,798	318,096	1,521,948
Beverages	564,779	2,033,141	1,009,453	713,427	4,320,800
Canned, bottled, frozen foods, jams, jellies, preserves, etc.	824,371	811,424	392,450	307,314	2,335,559
Multiple and all other food uses	237,500	702,764	48,247	325,721	1,314,232
Non-food products	10,060	104,792	6,224	10,621	131,697
Hotels, restaurants, institutions	6,654	121,421	8,315	1,232	137,622
Wholesale grocers, jobbers, sugar dealers	3,111,877	12,744,041	733,904	27,898	16,617,720
Retail grocers, chain stores, super markets	714,404	5,126,352	101,041	2,685	5,944,482
All other deliveries, includ- ing deliveries to Government agencies	103,845	186,261	3,690	45	293,841
TOTAL DELIVERIES	7,817,755	25,977,119	3,398,996	2,116,701	39,310,571
Deliveries in consumer-size packages (less than 100 lb.) 4/	1,976,433	13,712,534	99,333	-	15,788,300

Source: Reports of primary distributors of sugar to Sugar Branch, PMA.

1/ Represents 96 percent of deliveries by primary distributors in continental United States.

2/ Includes raw sugar delivered by refiners for direct consumption.

3/ Includes continental production and imports.

4/ "Deliveries in consumer-size packages" are included in "Total Deliveries."

Table 7 SUGAR DELIVERIES, BY TYPE OF PRODUCT OR BUSINESS OF BUYER, SECOND QUARTER AND FIRST SIX MONTHS, 1950 AND 1949

UNITED STATES

Product or Business of Buyer	Second Quarter		Percent change	First Six Months		Percent change
	1950 (100-lbs.)	1949 (100-lbs.)		1950 (100-lbs.)	1949 (100-lbs.)	
Bakery and allied products, cereals and cereal products	4,580,231	3,093,637	✓ 9.3	6,518,125	6,022,654	✓ 4.9
Confectionery and related products	3,312,379	2,864,107	✓ 15.7	6,650,097	5,756,970	✓ 15.5
Ice cream and dairy products	1,521,948	1,464,315	✓ 3.9	2,375,181	2,347,393	✓ 1.2
Beverages	4,520,800	4,292,767	✓ 0.4	7,537,223	7,193,677	✓ 2.0
Canned, bottled, frozen foods, jams, jellies, preserves, etc.	2,335,359	1,795,518	✓ 30.1	5,766,297	5,215,061	✓ 17.8
Multiple and all other food uses	1,314,232	999,009	✓ 31.3	2,239,531	1,947,541	✓ 15.0
Non-food products	151,697	150,779	- 12.7	328,333	354,928	- 7.3
Hotels, restaurants, institutions	157,622	139,421	- 1.3	264,128	279,807	- 5.6
Wholesale grocers, jobbers, sugar dealers	16,317,720	13,496,370	✓ 23.1	23,179,048	25,461,186	✓ 10.7
Retail grocers, chain stores, super markets	5,944,432	6,140,796	- 3.2	11,015,617	11,516,204	- 1.3
All other deliveries, including deliveries to Govt. agencies	293,841	409,304	- 28.1	719,423	1,017,034	- 29.3
TOTAL DELIVERIES	39,315,571	34,345,261	✓ 12.3	69,213,563	64,812,873	✓ 6.8
Deliveries in consumer-size ¹ / ₁ packages (less than 100 pounds)	15,788,300	13,771,916	✓ 14.6	27,776,858	25,652,000	✓ 8.2

Source: Reports of primary distributors of sugar to the Sugar Branch, P.M.A.

¹/₁ "Deliveries in consumer-size packages" are included in "Total Deliveries"

Table 8 SUGAR DELIVERIES, BY TYPE OF PRODUCT OR BUSINESS OF BUYER, SECOND QUARTER AND FIRST SIX MONTHS, 1950 AND 1949

NEW ENGLAND

Product or Business of Buyer	Second Quarter		Percent change	First Six Months		Percent change
	1950 (100-lb.)	1949 (100-lb.)		1950 (100-lb.)	1949 (100-lb.)	
Bakery and allied products, cereals and cereal products	162,842	165,443	- 1.6	298,680	301,181	- .8
Confectionery and related products	314,409	276,703	✓ 13.6	644,394	605,929	✓ 7.2
Ice cream and dairy products	99,696	109,230	- 8.7	150,606	159,032	- 5.3
Beverages	171,847	172,575	- .4	263,967	265,693	✓ 1.2
Canned, bottled, frozen foods, jams, jellies, preserves, etc.	78,896	83,695	- 5.7	150,702	172,770	-12.8
Multiple and all other food uses	56,156	32,317	✓ 73.8	87,805	55,560	✓ 58.0
Non-food products	4,313	11,697	- 53.0	9,238	16,269	-43.2
Hotels, restaurants, institutions	14,344	15,311	- 6.3	28,918	31,315	- 7.7
Wholesale grocers, jobbers, sugar dealers	770,479	762,815	✓ 1.0	1,448,921	1,438,940	✓ .7
Retail grocers, chain stores, super markets	426,278	427,019	- .2	853,321	830,956	✓ 2.7
All other deliveries, including deliveries to Gov't agencies	8,514	7,435	✓ 14.5	17,297	20,137	-14.1
TOTAL DELIVERIES	2,108,374	2,064,240	✓ 2.1	3,958,849	3,897,782	✓ 1.6
Deliveries in consumer-size 1/ packages (less than 100 pounds)	809,460	778,683	✓ 4.0	1,625,419	1,548,013	✓ 1.7

Source: Reports of primary distributors of sugar to the Sugar Branch, P.M.A.
 1/ "Deliveries in consumer-size packages" are included in "Total Deliveries"

Table 9 SUGAR DELIVERIES, BY TYPE OF PRODUCT OR BUSINESS OF BUYER, SECOND QUARTER AND FIRST SIX MONTHS, 1950 AND 1949

MIDDLE ATLANTIC

Product or Business of Buyer	Second Quarter		Percent change	First Six Months		Percent change
	1950 (100-lbs.)	1949 (100-lbs.)		1950 (100-lbs.)	1949 (100-lbs.)	
Bakery and allied products, cereals and cereal products	1,093,032	1,140,235	- 4.1	2,035,739	2,182,880	- 6.7
Confectionery and related products	1,616,435	1,388,050	+ 16.5	3,002,963	2,732,017	+ 9.9
Ice cream and dairy products	476,943	503,043	- 5.2	748,009	771,980	- 3.1
Beverages	1,070,090	1,114,047	- 3.9	1,891,698	1,888,147	- .2
Canned, bottled, frozen foods, jams, jellies, preserves, etc.	533,811	477,810	+ 11.7	963,870	797,066	+ 20.9
Multiple and all other food uses	732,452	536,016	+ 33.6	1,376,458	1,033,789	+ 33.1
Non-food products	61,444	35,690	+ 72.2	141,281	88,969	+ 58.8
Hotels, restaurants, institutions	88,400	79,489	+ 11.2	169,015	157,592	+ 7.2
Wholesale grocers, jobbers, sugar dealers	2,334,902	2,249,445	+ 3.8	4,369,817	4,270,222	+ 2.3
Retail grocers, chain stores, super markets	1,344,427	1,299,137	+ 3.5	2,540,905	2,430,379	+ 4.5
All other deliveries, including deliveries to Gov't agencies	107,555	88,743	+ 21.2	192,721	207,876	- 7.3
TOTAL DELIVERIES	9,459,491	8,911,705	+ 5.0	17,432,476	16,561,417	+ 5.3
Deliveries in consumer-size 1/ packages (less than 100 pounds)	2,731,841	2,516,403	+ 8.6	5,112,885	4,716,275	+ 8.4

Source: Reports of primary distributors of sugar to the Sugar Branch, P.M.A.

1/ "Deliveries in consumer-size packages" are included in "Total Deliveries"

Table 10 SUGAR DELIVERIES, BY TYPE OF PRODUCT OR BUSINESS OF BUYER, SECOND QUARTER AND FIRST SIX MONTHS, 1950 AND 1949

Product or Business of Buyer	NORTH CENTRAL			
	Second Quarter		First Six Months	
	1950 (100-lbs.)	1949 (100-lbs.)	1950 (100-lbs.)	1949 (100-lbs.)
			Percent change	Percent change
Bakery and allied products, cereals and cereal products	1,044,053	875,347	✓ 19.3	✓ 14.7
Confectionery and related products	963,917	831,541	✓ 15.9	✓ 32.0
Ice cream and dairy products	481,707	454,568	✓ 6.0	✓ 1.8
Beverages	750,674	730,128	✓ 2.8	- 10.8
Canned, bottled, frozen foods, jams, jellies, preserves, etc.	542,877	393,786	✓ 37.9	✓ 36.7
Multiple and all other food uses	368,150	245,414	✓ 50.0	✓ 1.9
Non-food products	30,659	23,726	✓ 29.2	✓ 24.7
Hotels, restaurants, institutions	15,455	16,405	- 5.8	- 18.7
Wholesale grocers, jobbers, sugar dealers	5,840,568	4,251,758	✓ 37.4	✓ 17.1
Retail grocers, chain stores, super markets	1,847,127	1,784,012	✓ 3.5	✓ 3.3
All other deliveries, including deliveries to Gov't agencies	56,123	45,357	✓ 23.7	✓ 0.5
TOTAL DELIVERIES	11,941,310	9,652,042	✓ 23.7	✓ 12.9
Deliveries in consumer-size 1/ packages (less than 100 pounds)	4,941,088	3,957,790	✓ 24.8	✓ 14.4

Source: Reports of primary distributors of sugar to the Sugar Branch, P.M.A.

1/ "Deliveries in consumer-size packages" are included in "Total Deliveries"

Table 11 SUGAR DELIVERIES, BY TYPE OF PRODUCT OR BUSINESS OF BUYER, SECOND QUARTER AND FIRST SIX MONTHS, 1950 AND 1949

SOUTH

Product or Business of Buyer	Second Quarter		Percent change	First Six Months		Percent change
	1950 (100-lbs.)	1949 100-lbs.)		1950 (100-lbs.)	1949 (100-lbs.)	
Bakery and allied products, cereals and cereal products	681,422	569,110	✓ 19.7	1,263,619	1,097,413	✓ 15.1
Confectionery and related products	239,080	195,436	✓ 22.3	484,009	404,551	✓ 19.6
Ice cream and dairy products	1,297,955	246,700	✓ 20.8	439,806	393,487	✓ 11.8
Beverages	1,958,422	1,868,191	✓ 4.9	3,270,698	2,941,273	✓ 11.2
Canned, bottled, frozen foods, jams, jellies, preserves, etc.	519,139	307,211	✓ 69.0	899,809	592,586	✓ 51.8
Multiple and all other food uses	81,963	93,372	- 12.2	140,745	161,384	- 12.8
Non-food products	34,427	78,505	- 56.1	88,137	194,926	- 54.8
Hotels, restaurants, institutions	14,601	12,898	✓ 13.2	29,427	26,981	✓ 9.1
Wholesale grocers, jobbers, sugar dealers	5,858,176	4,665,786	✓ 25.6	9,617,100	8,500,849	✓ 13.1
Retail grocers, chain stores, super markets	1,695,935	1,960,723	- 13.5	3,186,209	3,478,621	- 8.4
All other deliveries, including deliveries to Gov't agencies	43,372	177,453	- 75.3	139,519	385,575	- 63.6
TOTAL DELIVERIES	11,424,992	10,175,370	✓ 12.3	19,559,078	18,175,985	✓ 7.6
Deliveries in consumer-size 1/ packages (less than 100 Pounds)	5,486,051	4,806,165	✓ 14.1	9,257,429	8,707,853	✓ 6.3

Source: Reports of primary distributors of sugar to the Sugar Branch, F.M.A.

1/ "Deliveries in consumer-size packages" are included in "Total Deliveries"

Table 12 SUGAR DELIVERIES, BY TYPE OF PRODUCT OR BUSINESS OF BUYER, SECOND QUARTER AND FIRST SIX MONTHS, 1950 AND 1949

WEST

Product or Business of Buyer	Second Quarter		Percent change	First Six Months		Percent change
	1950 (100-lbs.)	1949 (100-lbs.)		1950 (100-lbs.)	1949 (100-lbs.)	
Bakery and allied products, cereals and cereal products	398,942	343,502	✓ 16.1	764,098	736,357	✓ 3.8
Confectionery and related products	178,538	172,377	✓ 3.6	358,108	377,167	- 5.1
Ice cream and dairy products	165,647	150,774	✓ 9.9	270,224	270,316	- -
Beverages	369,767	407,766	- 9.3	578,956	611,144	- 5.3
Canned, bottled, frozen foods, jams, jellies, preserves, etc.	650,836	532,816	✓ 24.0	894,295	1,010,868	- 11.5
Multiple and all other food uses	75,511	91,839	- 17.8	113,442	165,435	- 31.4
Non-food products	254	1,160	- 78.1	24,561	2,077	✓ 1082.5
Hotels, restaurants, institutions	4,822	15,318	- 68.5	10,694	31,847	- 66.4
Wholesale grocers, jobbers, sugar dealers	1,813,595	1,566,566	✓ 15.8	3,244,132	3,138,702	✓ 3.4
Retail grocers, chain stores, super markets	630,715	669,905	- 5.9	1,143,945	1,288,802	- 11.3
All other deliveries, including deliveries to Gov't agencies	77,777	89,231	- 13.4	267,778	303,846	- 11.9
TOTAL DELIVERIES	4,376,404	4,041,904	✓ 8.3	7,670,233	7,936,561	- 3.3
Deliveries in consumer-size 1/ packages (less than 100 pounds)	1,819,862	1,712,875	✓ 6.2	3,355,074	3,327,570	✓ 0.2

Source: Reports of primary distributors of sugar to the Sugar Franch, P.M.A.

1/ "Deliveries in consumer-size packages" are included in "total Deliveries"

Table 13 DEXTROSE: TOTAL SALES, BY TYPE OF BUYER, SECOND QUARTER AND FIRST SIX MONTHS, 1950 AND 1949

Product or Business of Buyer	UNITED STATES				
	Second Quarter 1950 (100 lb.)	(100 lb.)	Percent Change	First 6 months 1950 (100 lb.)	Percent Change
Bakery and allied products, cereals and cereal products	1,031,584	739,869	+ 39.4	1,948,191	1,662,952 + 17.2
Confectionery and related products	73,308	68,421	+ 7.1	148,439	135,692 + 9.4
Ice cream and dairy products	88,948	80,656	+ 10.3	134,735	140,493 - 4.1
Beverages	215,916	193,918	+ 11.3	345,420	359,178 - 3.8
Canned, bottled, frozen foods, jams, jellies, pre- serves, etc.	86,054	78,805	+ 9.2	228,555	172,371 + 32.6
Multiple and all other food uses	91,082	64,998	+ 40.1	176,771	136,529 + 29.5
Non-food products	82,787	62,251	+ 33.0	165,873	143,030 + 16.0
Wholesale grocers, jobbers, retail grocers, chain; super-markets	62,712	43,802	+ 43.2	112,713	95,517 + 18.2
Other sales including sales to government agencies	69,366	22,564	+ 207.4	93,759	42,163 + 122.4
TOTAL DOMESTIC SALES 1/	1,801,757	1,355,284	+ 32.9	3,354,656	2,887,925 + 16.2

Source: Reports of dextrose manufacturers to the Sugar Branch, P.M.A.

1/ Excludes packaged dextrose; represents sales in continental United States and manufacturer's intra-company usage of dextrose.

Table 14

DEXTROSE: TOTAL SALES, BY TYPE OF BUYER, SECOND QUARTER AND FIRST SIX MONTHS, 1950 and 1949

Product or Business of Buyer	NEW ENGLAND					
	Second Quarter 1950 (100 lb.)	1949 (100 lb.)	Percent Change	First 6 months 1950 (100 lb.)	1949 (100 lb.)	Percent Change
Bakery and allied products, cereals and cereal products	44,628	28,506	+ 56.6	82,796	67,165	+ 23.3
Confectionery and related products	1,296	676	+ 91.7	2,073	1,863	+ 11.3
Ice cream and dairy products	4,209	3,977	+ 5.8	5,376	6,436	- 16.5
Beverages	13,207	5,950	+122.8	20,119	11,690	+ 72.1
Canned, bottled, frozen foods, jams, jellies, pre- serves, etc.	1,330	1,073	+ 24.0	2,830	2,268	+ 24.8
Multiple and all other food uses	3,113	1,597	+ 94.9	5,001	2,953	+ 69.4
Non-food products	1,009	324	+211.4	3,493	1,072	+ 225.8
Wholesale grocers, jobbers, retail grocers, chain; super-markets	894	863	+ 3.5	2,022	2,009	+ 0.6
Other sales including sales to government agencies	582	1,091	- 46.7	1,366	1,711	- 20.2
TOTAL DOMESTIC SALES 1/	70,268	44,057	+ 59.5	125,076	97,167	+ 28.7

Source: Reports of dextrose manufacturers to the Sugar Branch, P.M.A.

1/ Excludes packaged dextrose; represents sales in continental United States and manufacturer's intra-company usage of dextrose.

Table 15

DEXTROSE: TOTAL SALES, BY TYPE OF BUYER, SECOND QUARTER AND FIRST SIX MONTHS, 1950 AND 1949

MIDDLE ATLANTIC

Product or Business of Buyer	Second Quarter		Percent Change	First 6 months		Percent Change
	1950 (100 lb.)	1949 (100 lb.)		1950 (100 lb.)	1949 (100 lb.)	
Bakery and allied products, cereals and cereal products	124,009	132,237	+ 46.7	380,420	300,592	+ 26.6
Confectionery and related products	40,645	36,596	+ 11.1	77,889	73,447	+ 6.0
Ice cream and dairy products	16,430	15,550	+ 5.7	24,593	23,325	+ 5.4
Beverages	33,512	36,611	- 8.5	61,180	63,328	- 3.4
Canned, bottled, frozen foods, jams, jellies, pre- serves, etc.	15,013	14,661	+ 2.4	29,213	27,736	- 1.8
Multiple and all other food uses	32,474	28,275	+ 14.9	65,131	53,039	+ 22.8
Non-food products	28,209	21,861	+ 29.0	51,585	44,234	+ 16.6
Wholesale grocers, jobbers, retail grocers, chain; super-markets	4,606	3,208	+ 46.1	9,342	9,480	- 1.5
Other sales including sales to government agencies	20,983	7,507	+ 179.5	23,578	14,180	+ 65.9
TOTAL DOMESTIC SALES 1/	385,981	296,506	+ 30.2	722,871	611,361	+ 18.2

Source: Reports of dextrose manufacturers to the Sugar Branch, P.M.A.

1/ Excludes packaged dextrose; represents sales in continental United States and manufacturer's intra-company usage of dextrose.

Table 16

DEXTROSE: TOTAL SALES, BY TYPE OF BUYER, SECOND QUARTER AND FIRST SIX MONTHS, 1950 AND 1949

Product or Business of Buyer	NORTH CENTRAL			
	Second Quarter		Percent Change	First 6 months 1949 (100 lb.)
	1950 (100 lb.)	1949 (100 lb.)		
Bakery and allied products, cereals and cereal products	452,804	320,848	+ 41.1	857,394
Confectionery and related products	20,905	25,433	- 17.8	49,526
Ice cream and dairy products	29,721	27,691	+ 7.3	144,945
Beverages	104,934	92,895	+ 13.0	160,214
Canned, bottled, frozen foods, jams, jellies, pre- serves, etc.	20,890	15,312	+ 36.4	37,168
Multiple and all other food uses	38,726	28,099	+ 37.8	77,784
Non-food products	27,651	23,629	+ 17.0	54,208
Wholesale grocers, jobbers, retail grocers, chain; super-markets	27,851	16,365	+ 70.0	47,905
Other sales including sales to government agencies	19,173	6,557	+ 192.4	31,318
TOTAL DOMESTIC SALES 1/	742,655	556,849	+ 33.4	1,360,462
				1,154,771
				+ 17.8

Source: Reports of dextrose manufacturers to the Sugar Branch, P.M.A.

1/ Excludes packaged dextrose; represents sales in continental United States and manufacturer's intra-company usage of dextrose.

Table 17

DEXTROSE: TOTAL SALES, BY TYPE OF BUYER, SECOND QUARTER AND FIRST SIX MONTHS, 1950 AND 1949

SOUTH

Product or Business of Buyer	Second Quarter		Percent Change	First 6 months		Percent Change
	1950 (100 lb.)	1949 (100 lb.)		1950 (100 lb.)	1949 (100 lb.)	
Bakery and allied products, cereals and cereal products	234,670	180,924	+ 29.7	432,444	407,391	+ 6.1
Confectionery and related products	5,549	3,470	+ 59.9	9,737	6,447	+ 51.0
Ice cream and dairy products	24,845	20,587	+ 20.7	36,633	35,529	+ 3.1
Beverages	40,475	43,456	- 6.9	65,483	84,799	- 22.8
Canned, bottled, frozen foods, jellies, pre- serves, etc.	31,255	20,934	+ 49.3	135,046	83,260	+ 62.2
Multiple and all other food uses	13,383	4,835	+ 176.8	22,640	12,455	+ 81.8
Non-food products	24,153	15,745	+ 53.4	53,959	49,303	+ 9.4
Wholesale grocers, jobbers, retail grocers, chain; super-markets	14,642	12,850	+ 12.5	26,865	25,899	+ 3.7
Other sales including sales to government agencies	18,693	6,302	+ 196.6	26,140	10,679	+ 144.8
TOTAL DOMESTIC SALES	407,665	309,103	+ 31.9	808,947	715,762	+ 13.0

Source: Reports of dextrose manufacturers to the Sugar Branch, P.M.A.

1/ Excludes packaged dextrose; represents sales in continental United States and manufacturer's intra-company usage of dextrose.

Table 18

DEXTROSE: TOTAL SALES, BY TYPE OF BUYER, SECOND QUARTER AND FIRST SIX MONTHS, 1950 AND 1949

Product or Business of Buyer	WEST					
	Second Quarter 1950 (100 lb.)	Second Quarter 1949 (100 lb.)	Percent Change	First 6 months 1950 (100 lb.)	First 6 months 1949 (100 lb.)	Percent Change
Bakery and allied products, cereals and cereal products	105,473	77,354	+ 36.4	195,137	178,459	+ 9.3
Confectionery and related products	4,913	2,246	+118.7	9,214	7,449	+ 23.7
Ice cream and dairy products	13,743	12,851	+ 6.9	23,188	23,627	- 1.9
Beverages	23,788	15,006	+ 58.5	38,424	32,888	+ 16.8
Canned, bottled, frozen foods, jams, jellies, preserves, etc.	17,566	26,825	- 34.5	24,298	32,223	- 24.6
Multiple and all other food uses	3,366	2,192	+ 53.6	6,215	5,915	+ 5.1
Non-food products	1,765	692	+155.1	2,628	1,759	+ 49.4
Wholesale grocers, jobbers, retail grocers, chain; super-markets	14,639	10,496	+ 39.5	26,779	24,162	+ 10.8
Other sales including sales to government agencies	9,935	1,107	+727.5	11,417	2,382	+379.3
TOTAL DOMESTIC SALES 1/	195,188	148,769	+ 31.2	337,300	308,864	+ 9.2

Source: Reports of dextrose manufacturers to the Sugar Branch, P.M.A.

1/ Excludes packaged dextrose; represents sales in continental United States and manufacturer's intra-company usage of dextrose.

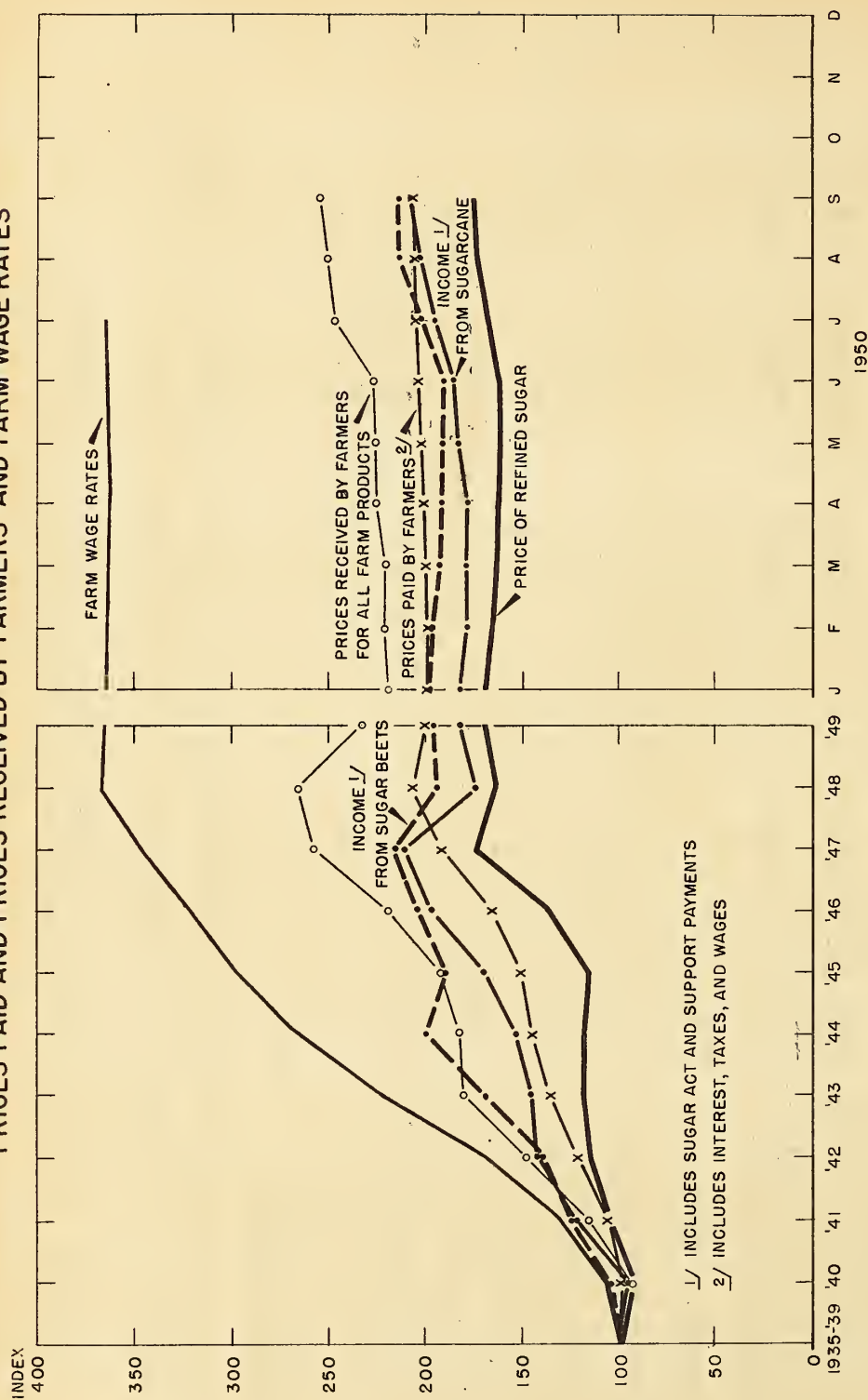
Table 19 CORN SIRUP UNMIXED: TOTAL SALES AS DISTRIBUTED AMONG DIFFERENT TRADES, UNITED STATES, SECOND QUARTER AND FIRST SIX MONTHS, 1950 and 1949

Product or Business of Buyer	Second Quarter		Percent change	First Six Months		Percent change
	1950 (100-lb.)	1949 (100-lb.)		1950 (100-lb.)	1949 (100-lb.)	
Bakery and allied products, cereal and cereal products	269,431	249,309	/ 8.1	488,836	479,870	/ 1.9
Confectionery and related products	1,620,202	1,480,359	/ 9.4	3,229,583	3,113,580	/ 3.7
Ice cream and dairy products	89,761	99,500	- 9.8	141,228	160,146	- 11.8
Brewery and brewery supply houses	(95,484)	(129,075)	(- 26.0)	(182,417)	(218,974)	(- 16.7)
Soft drinks	(6,318)	(2,106)	(/200.0)	(6,718)	(3,663)	(/ 83.4)
Total beverages	101,802	131,181	- 22.4	189,135	222,637	- 15.0
Canned, bottled, frozen foods, jams, jellies, preserves, etc.	195,711	170,541	/ 14.8	352,683	308,819	/ 14.2
Blended Sirups	(701,986)	(673,578)	(/ 4.2)	(1,546,936)	(1,538,255)	(/ 0.6)
Miscellaneous food products	(136,470)	(99,011)	(/ 37.8)	(231,351)	(188,425)	(/ 22.8)
Total multiple and all other products	833,456	772,589	/ 8.5	1,778,287	1,726,680	/ 3.0
Non-food products	113,887	91,004	/ 25.1	226,324	186,326	/ 21.5
Wholesale grocers, jobbers, sugar dealers	69,994	63,728	/ 9.8	132,102	115,069	/ 14.8
TOTAL DOMESTIC SALES	3,299,244	3,058,211	/ 7.9	6,536,178	6,313,127	/ 3.6
TOTAL DOMESTIC SALES, DRY BASIS 1/	2,649,293	2,455,744		5,250,157	5,069,441	

Source: Corn refiners' reports to Price Waterhouse; distributed through Grain Branch, PMA

1/ Based on 43° sirup with average solids content of 80.3 percent. Computed, Sugar Branch, PMA.

SUGAR PRICES AND GROWERS' INCOME FROM SUGAR BEETS AND SUGARCANE COMPARED WITH PRICES PAID AND PRICES RECEIVED BY FARMERS AND FARM WAGE RATES



Returns to growers were higher per ton of sugar beets and sugarcane in 1949 than in 1948 because of improvements in the prices of raw and refined sugar. At current price levels of sugar and molasses, 1950-crop returns for sugar beets and sugarcane would be greater than in 1949. However, current price levels do not necessarily indicate the level of prices which will prevail during the coming marketing season.

PROSPECTIVE INCOMES FROM SUGAR BEETS AND SUGAR CANE

At present market prices for sugar and molasses, grower incomes would be nearly equal to the high point reached in 1947, the year sugar prices reached their highest level during the war and early postwar period. The 1947 sugar beet crop income was aided by a price support program. Although no price support program was in effect for that year for sugarcane growers, the 1947 crop was largely harvested and marketed before prices started to decline in January 1948.

Sugarcane growers' income in September 1950 was about 208 percent and sugar beet growers' income about 214 percent of the prewar (1935-39) level. These income levels compare with 207 percent for prices of things farmers buy, including interest, taxes and wage rates; about 254 percent for prices received for all products sold by farmers; and 364 percent for farm wage rates.

The increases in incomes since the prewar period are attributable to improvements in grower sharing under beet and cane contracts, to increases in the basic rate of Sugar Act payments and to increases in the prices of sugar and molasses. The current prices of sugar and molasses do not necessarily indicate the average level of sugar prices during the coming marketing season.

Mainland sugarcane growers' income is dependent upon the price of sugar and molasses during the marketing season. In Louisiana, the marketing season begins on October 6, 1950 (or the Friday within the first week of actual trading) and ends on January 25, 1951. In Florida, the marketing season for sugar begins October 13, 1950 and ends May 24, 1951. Molasses payments to growers in Florida are based on the net liquidation price received for molasses during the 12-month period ending May 31, 1951. Sugar beet growers' income is dependent upon the net proceeds derived from beet sugar marketed during the 12-month period commencing generally in October of each year.

Table 20 INDEX NUMBERS OF SUGAR PRICES AND GROWERS' INCOME FROM MAINLAND SUGAR CANE AND SUGAR BEETS COMPARED WITH PRICES PAID AND PRICES RECEIVED BY FARMERS AND FARM WAGE RATES

Annual 1940-49, Monthly January 1950 to date (1935-39 = 100)

Period	Ref. cane sugar price, net cash, N. Y.	Growers' Income ^{1/} from cane from beets		Prices rec'd by farmers ^{2/}	Prices paid by farmers ^{3/}	Farm wage rates ^{4/}
1940	93	95	105	93	99	107
1941	105	123	125	115	106	131
1942	116	142	139	148	122	170
1943	118	145	171	179	136	224
1944	117	154	199	183	146	267
1945	115	171	190	193	151	297
1946	136	197	204	219	166	320
1947	174	211	215	257	192	346
1948	163	174	194	266	207	366
1949	168	182	197 p	233	200	364
1950						
Jan.	169	184 a/	200 b/	220	199	364
Feb.	166	180 a/	197 b/	221	198	-
Mar.	162	179 a/	193 b/	221	200	-
Apr.	162	178 a/	191 b/	225	201	362
May	162	183 a/	191 b/	231	203	-
June	162	185 a/	191 b/	231	204	-
July	167	194 a/	203 b/	246	205	364
Aug.	173	203 a/	214 b/	250	206	-
Sep.	175 p	208 a/	214 b/	254	207	-
Oct.						
Nov.						
Dec.						

p - Preliminary

^{1/} Includes Sugar Act and support payments

^{2/} BAE; for all farm products

^{3/} BAE; including interest, taxes and wage rates

^{4/} BAE; Farm Labor. 1940-49, annual averages, 1950, quarterly rates

a/ Calculated on basis that season average price for raw sugar will equal the average raw sugar price for the respective month and that 1950-crop settlement terms will apply. Includes estimated Sugar Act payments of \$1.19 per ton of cane.

b/ Calculated on basis that net proceeds from sugar sold will be \$1.20 less than the cane sugar price prevailing in the respective month and that 1950 beet contract terms apply. Includes estimated Sugar Act payments of \$2.47 per ton of beets.

VARIATIONS IN RAW SUGAR RECOVERIES IN LOUISIANA

Means of increasing raw sugar recoveries per ton of sugarcane in Louisiana have come in for considerable discussion in the last several year. The significance of this problem can best be illustrated by pointing out that variations in sugar recoveries per ton of cane from the factory with the lowest sugar recovery to the factory with the highest sugar recovery per ton of gross cane in Louisiana in 1947, 1948 and 1949 have been equivalent to from nearly one-third to one-half of the purchase price of a ton of cane for these years. In 1947 the variation in pounds of sugar recovered per ton of cane ranged from 117.6 to 177.9. At the season's average price for Louisiana raw sugar of 6.21 cents per pound, this range of 60.3 pounds was equal to \$3.74 per ton of cane. In 1948, recovery as between factories varied from 126.9 to 163.9 pounds. This was equal to 37.9 pounds of sugar or \$2.13 per ton of gross cane, calculated at the 1948 season's average price of 5.62 cents per pound of sugar. Similarly, in 1949, the spread in sugar recovery per ton of gross cane ranged from 135.6 to 180.9 pounds as between the lowest and highest recoveries of individual factories. This variation of 45.3 pounds was equivalent, at the prevailing season's average price of 5.82 cents, to \$2.64 per ton of gross cane.

The recovery of raw sugar from sugarcane is dependent upon several factors, the most important of which is the percentage of sucrose in cane. To a certain degree sucrose in cane is influenced by factors beyond human control, i.e., rainfall, temperature and general weather conditions during the growing and harvesting season. There are, however, factors influencing the percentage sucrose in cane which are within the control of the cane grower. These include the selection of cane varieties, the proper planting and cultivation of cane, the harvesting of cane as near as possible to optimum maturity (i.e., at the time the cane contains the maximum amount of sucrose and a minimum of invert sugars and non-sugar solids), the proper topping and detrashing of cane and the prompt delivery of harvested cane to the mill. In this respect it should be mentioned that because of the necessity for supplying cane to the mills throughout the short grinding season which usually starts before cane is fully matured, it is not always possible to harvest cane at its optimum maturity.

The other factors influencing the recovery of sugar are largely within the control of the factory. These include the regulation of cane deliveries in a manner to prevent delays in grinding through the excessive piling-up of cane in the yard and the efficient processing of cane. In the milling of cane and the manufacture of raw sugar there are, however, certain losses which are inevitable but the degree of which can be controlled by the factory. These losses occur in bagasse, presscake, molasses and through undetermined sources. The sum of these losses represents the difference between the total sucrose in sugarcane and the quantity of sucrose finally appearing as sugar.

In order to study further the fluctuations in sugar recoveries, data for raw sugar factories in Louisiana for the crop years 1947, 1948 and 1949 were examined under three main categories, designed to represent the quality of the cane, milling efficiency, and efficiency of the boiling house or sugar side of the mill. Although these results are the average results of all raw sugar factories in Louisiana during the three-year period under consideration, they can be used as a guide or yardstick in evaluating individual factory operations. The three categories under which the data were studied, based on the sucrose balance, are:

1. PERCENT SUCROSE IN CANE. This percentage is the total amount of sucrose in the cane expressed as percent of the weight of cane ground. It fluctuates with weather conditions, variety of cane, freshness of cane, etc. As it represents total sucrose in the cane, it can be used as a factor-measuring quality of cane actually ground.
2. LOSSES OF SUCROSE IN BAGASSE AS PERCENT OF SUCROSE IN CANE. This is a measure of milling efficiency, since it shows the proportion of the total sucrose in the cane that is left in the bagasse. To some extent, this is affected by the cane variety, percent fibre in cane, and percent trash in cane. Results from the three years' operations of Louisiana factories indicate the variation in milling efficiency of the different factories varied considerably.
3. LOSSES OF SUCROSE IN THE BOILING HOUSE AS PERCENT OF SUCROSE IN CANE. Of the sucrose that is extracted from the cane, the factory has losses in molasses and in presscake, and also losses that are undetermined. These boiling-house losses of sucrose give a measure of the efficiency of the factory in recovering sugar from the juice. After deducting these losses from the sucrose that was extracted in juice, there remains the sucrose recovered as sugar.

Data for the three crop years 1947, 1948 and 1949, taken from Form SU-119 (factory run reports) for 38 raw sugar factories, were computed for the three factors noted above. When each of these three factors were plotted against sucrose recovered in sugar, percent cane, an almost linear or straightline relationship resulted. On the basis of this fact, the effect of each factor on sugar recovery was determined by the use of multiple linear correlation. From the results obtained, it was found that if the percent sucrose in cane was raised or lowered by one percent, the recovery of 96° raw sugar varied directly by 14.81 pounds per ton of cane. An increase of one percent in sucrose losses in bagasse, expressed as a percent of the total sucrose in cane, decreased the sugar recovery by 1.98 pounds per ton of cane ground. Similarly, a one percent increase in boiling-house losses of sucrose, expressed as percent of the total sucrose in cane, decreases recovery by 2.03 pounds of 96° sugar per ton of cane (see charts which follow). The recovery of raw sugar per ton of cane ground, for raw sugar factories in Louisiana during the three-year period 1947-49, based on the correlation results above varied as shown in Table 21.

Table 21 RECOVERY OF 96° SUGAR PER TON OF CANE GROUND, BASED ON SUCROSE IN CANE, SUCROSE LOSSES IN BAGASSE AND SUCROSE LOSSES IN BOILING HOUSE 1/
LOUISIANA, 1947, 1948 and 1949 CROPS

Sucrose Losses in Bagasse, Percent Sucrose in Cane													
Sucrose: in cane: % cane	10 Percent				11 Percent				12 Percent				
	Sucrose Losses in Boiling House, Percent				Sucrose in Cane								
	(Percent)				(Percent)				(Percent)				
	11	12	13	14	11	12	13	14	11	12	13	14	
	(Pounds of raw sugar per ton cane)												
9	149.3	147.2	145.2	143.2	147.3	145.2	143.2	141.2	145.3	143.3	141.2	139.2	
10	164.1	162.0	160.0	158.0	162.1	160.0	158.0	156.0	160.1	158.1	156.0	154.0	
11	178.9	176.8	174.8	172.8	176.9	174.8	172.8	170.8	174.9	172.9	170.8	168.8	

1/ These recoveries represent the composite results of 38 raw sugar factories for the three years, 1947-49. They, of course, will not apply to any one factory directly.

Source: Data from SU-119, factory run reports, Louisiana 1947-49. 38 factories producing only raw sugar during the three years were used, giving 114 cases in the study.

In Table 21, the effect of changes in each of the variable factors on sugar recovery can be observed. If the percent of sucrose losses in bagasse and in the boiling-house are held constant, a 1 percent change in sucrose in cane will affect recovery by 14.8 pounds of sugar per ton of cane. When sucrose in cane and sucrose losses in boiling-house are held constant, a 1 percent change in sucrose losses in bagasse will affect recovery by approximately 2 pounds of sugar per ton of cane. Similarly, if percent sucrose in cane and sucrose losses in bagasse are held constant, a 1 percent change in boiling-house losses will affect recovery by about 2 pounds of sugar per ton of cane.

VARIATIONS ON AN INDIVIDUAL FACTORY BASIS

For the crop years 1947, 1948 and 1949, maximum variations in the three factors, as between individual factories, were as shown in Table 22.

Table 22 COMPARISON OF FACTORIES OBTAINING HIGH AND LOW SUCROSE RECOVERY, AS RELATED TO PERCENT SUCROSE IN CANE, LOSSES OF SUCROSE IN BAGASSE, AND LOSSES OF SUCROSE IN THE BOILING HOUSE, LOUISIANA, 1947, 1948, AND 1949

Factor	:	Factory	:	:	Difference
	:	with	:	:	Converted to
	:	Low	:	High	Difference
	:	Recovery	:	Recovery	lbs. of sugar
	:		:		per ton of
	:		:		cane
		Percent		Percent	Percent
					lbs. of sugar 1/
Percent Sucrose in Cane:					
1947		8.77		10.93	2.16
1948		8.79		10.11	1.32
1949		9.08		10.54	1.86
Losses of Sucrose in Bagasse as Percent Sucrose in Cane:					
1947		18.44		5.99	12.45
1948		16.09		6.32	9.77
1949		17.03		5.21	11.82
Losses of Sucrose in Boiling House as Percent Sucrose in Cane:					
1947		28.19		9.46	18.73
1948		26.00		9.34	16.66
1949		20.22		9.84	10.38

1/ Differences converted to pounds of sugar per ton of cane on the basis of 14.81 pounds of sugar per one percent change in sucrose content of cane; 1.98 pounds of sugar per one percent change in sucrose losses in bagasse and 2.03 pounds of sugar per one percent change in sucrose losses in boiling house.

Source: Data from SU-119 (Factory Run Reports)

The differences in the percent sucrose in cane delivered to factories during the three-year period, as between the factory receiving cane with the lowest amount of sucrose and the factory getting cane with the highest amount of sucrose, amounted to 31.99 pounds of sugar per ton of cane in 1947, 19.55 pounds in 1948 and 27.55 pounds in 1949. Similarly, sucrose losses in bagasse varied sugar recoveries by 24.65 pounds per ton of cane in 1947, by 19.34 pounds in 1948 and 23.40 pounds in 1949. Sucrose losses in the boiling-house resulted in differences in sugar recovered per ton of cane of 38.02 pounds in 1947, 33.82 pounds in 1948 and 21.07 pounds in 1949. Variations in boiling-house losses influenced recoveries most in 1947 and 1948, while sucrose content of cane had the greater effect in 1949. In any one year, however, factory losses, represented by losses of sucrose in bagasse, molasses, presscake and undetermined, were more important in affecting sugar recoveries than variations in sucrose in cane. Part of the factory losses can be attributed to delivery of unclean, improperly topped or stale cane and, as mentioned before, to certain losses which are inevitable in any sugar mill.

ANNUAL STATE AVERAGE SUCROSE PERCENTAGES OF CANE AND LOSSES IN PROCESSING FOR THE YEARS 1937-49

As shown in Table 23, over the 13-year period since 1937, the average variation in percent sucrose in cane, for all sugar factories in Louisiana, has been from 9.562 in 1948 to 10.413 in 1939 or 0.851 percent, which, on the basis of 14.81 pounds of sugar per one percent variation equals 12.6 pounds change in raw sugar recovery.

Table 23 PERCENT SUCROSE IN CANE, AND SUCROSE LOSSES, PERCENT CANE, LOUISIANA, 1937 THROUGH 1949

Crop Year	Percent Sucrose in Cane	Sucrose Losses Percent Cane in:			
		Bagasse	Molasses	Press Cake	Undetermined
		(percent)			
1937	9.635	0.848	1.004	0.111	0.261
1938	10.335	0.884	1.002	0.097	0.220
1939	10.413	0.860	0.964	0.082	0.179
1940	9.821	0.854	0.969	0.082	0.141
1941	9.979	0.824	0.961	0.078	0.183
1942	10.372	0.919	0.945	0.081	0.198
1943	10.201	0.925	1.067	0.081	0.253
1944	9.696	0.956	1.047	0.104	0.266
1945	9.565	0.853	1.130	0.104	0.212
1946	9.887	0.983	1.001	0.120	0.297
1947	9.771	1.069	1.012	0.168	0.365
1948	9.562	0.997	1.084	0.191	0.273
1949	9.951	0.938	0.996	0.147	0.211

Source: SU-119 - factory run reports

Sucrose losses in bagasse varied from a low of 0.824 percent in 1941 to a high of 1.069 percent in 1947. This change of 0.245 percent, assuming 10 percent sucrose in cane (average for last 13 years was 9.937 percent), would amount to 4.85 pounds of raw sugar per ton of cane ground. Variations in milling efficiency thus have resulted in changes in raw sugar recovered of nearly 5 pounds per ton of cane.

Losses of sucrose to blackstrap have varied from a low of 0.961 percent in 1941 to a high of 1.130 percent in 1945, or by 0.169 percent. Again, assuming 10 percent sucrose in cane, and using the results of the foregoing correlation analysis, this variation in sucrose losses in blackstrap has resulted in a 3.43 pound change in sugar recovery per ton of cane ground. Similarly, presscake losses have varied by 0.113 percent, or by 2.29 pounds of sugar per ton of cane, and undetermined losses by 0.224 percent or 4.55 pounds of sugar per ton of cane. If these boiling-house losses were held to the minimum of the last 13 years, an additional 10 pounds of raw sugar or better could be recovered per ton of cane ground.

CONCLUSIONS

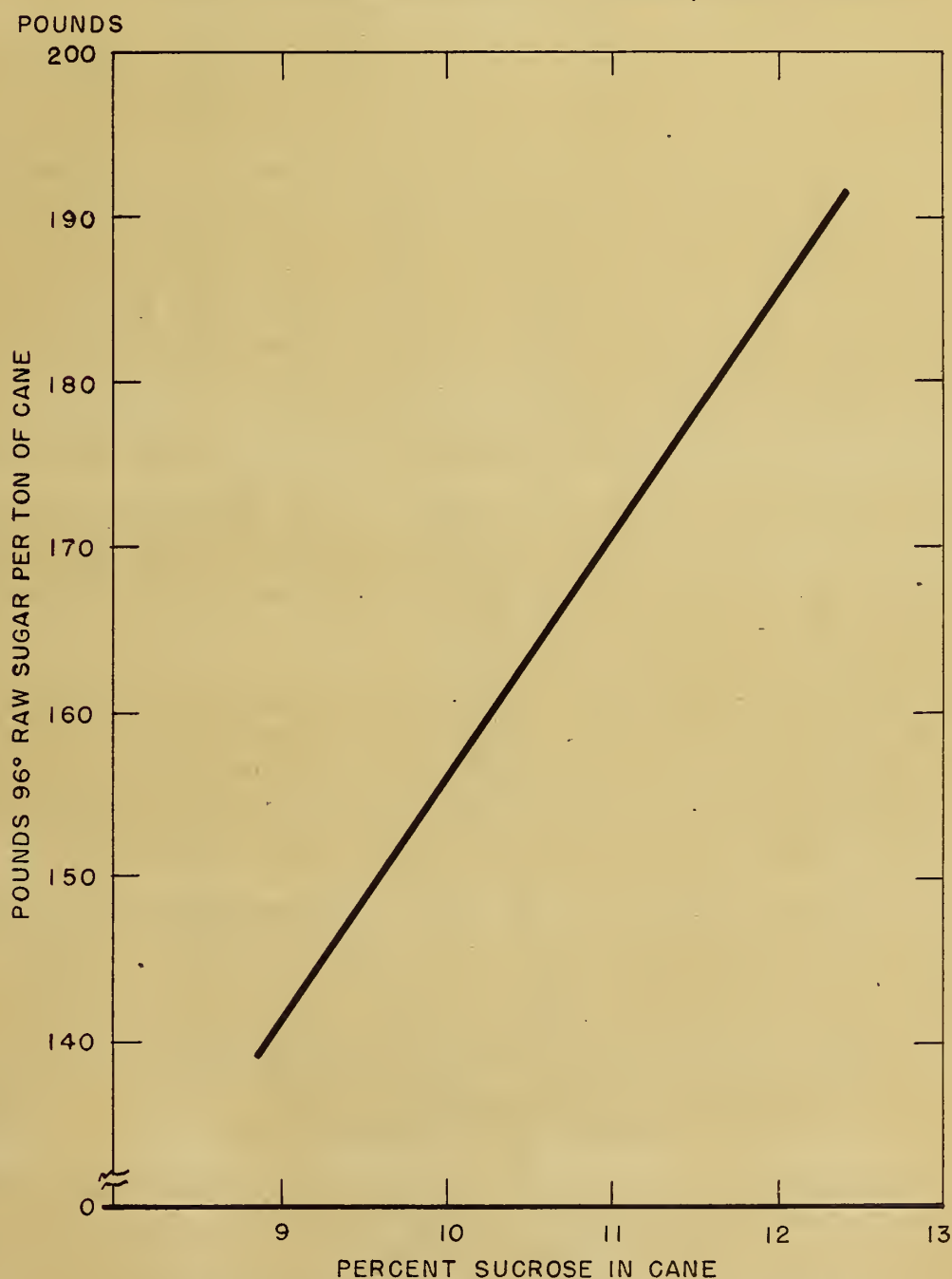
The foregoing analyses, on both individual annual factory averages and annual averages for all Louisiana factories as a whole, show the results which may be obtained by minimizing sucrose losses in the factory and obtaining cane with the highest possible sucrose content.

To summarize, the percent sucrose in cane is potentially the most important factor governing sugar recovery, but variations from year to year are largely beyond either grower or factory control. It can be influenced, however, by delivery of fresh, mature cane to the factory and prompt milling of the cane so delivered. This is part grower and part factory responsibility.

Sucrose losses in bagasse can be influenced to a great extent by both the grower and the factory. Cane containing excessive trash and dirt, as well as varieties presenting extraction difficulties, slows milling operations and provides increased quantities of bagasse to absorb sucrose. The delivery of satisfactory cane by the grower can prevent this. Efficient milling equipment in the factory can increase the extraction rate and decrease sucrose losses in bagasse. This part of the problem is the responsibility of the factory.

The control of boiling-house losses of sucrose is also primarily within the province of the factory, depending upon the equipment in the boiling house and the skill of the personnel. However, stale or dirty cane can decrease the efficiency of operations due to increased impurities in the juice, resulting in clarification and other problems. The remedy for this problem is the processing of clean, fresh sugarcane. The securing of such sugarcane is the responsibility of both the grower and the factory; the grower to deliver cane which is properly cut, topped, and cleaned, and the factory to provide orderly delivery schedules so as to be able to mill cane promptly.

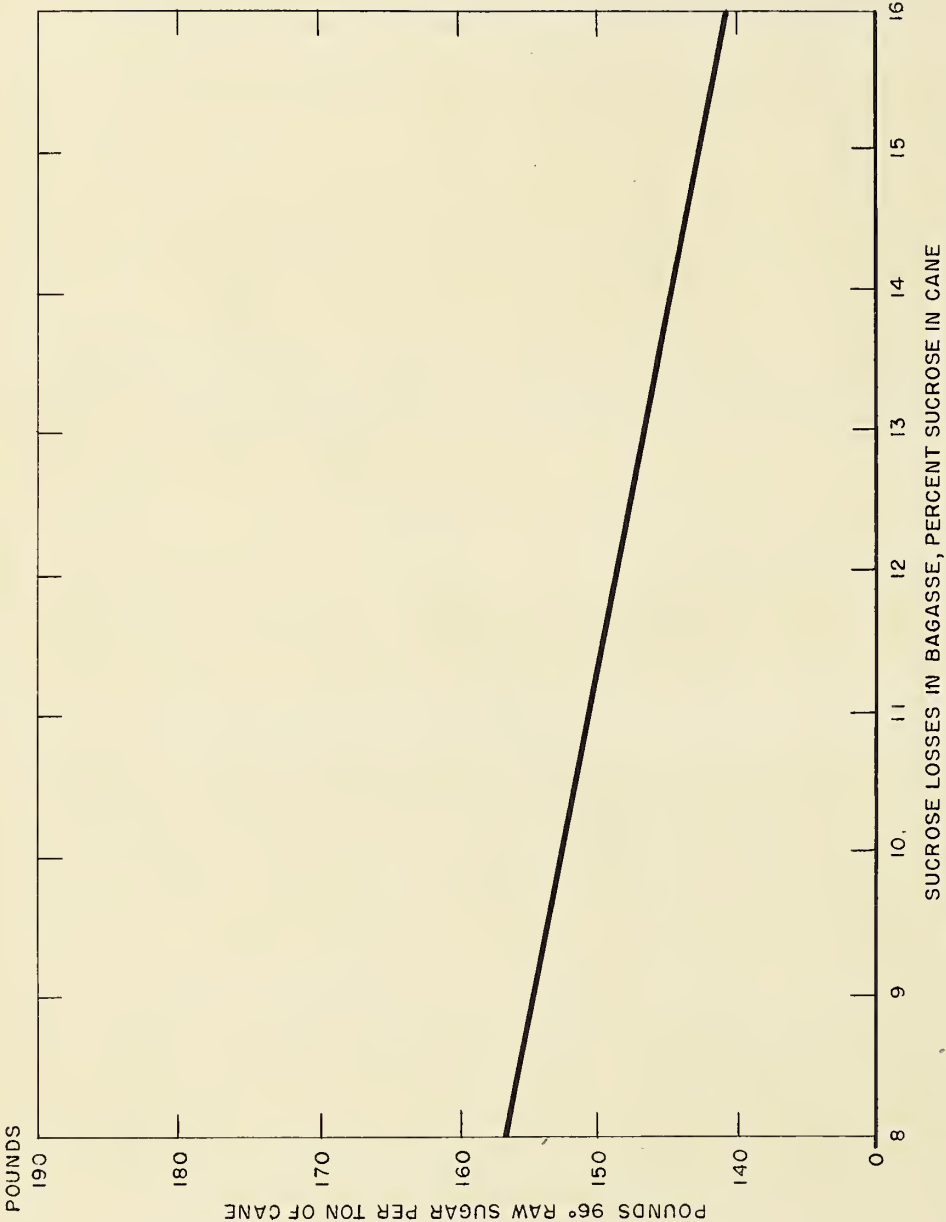
VARIATIONS IN RAW SUGAR RECOVERY PER TON OF
CANE AND PERCENT SUCROSE IN CANE, LOUISIANA
FACTORY AVERAGES BY YEARS, 1947-1949



The factory averages of the sucrose percentages of the cane ground varied from 9 to 12 percent and the resultant sugar recoveries ranged from 141, 1 to 185. 6 pounds, or by 14.8 pounds per 1 percent change in sucrose content.

Figure VII

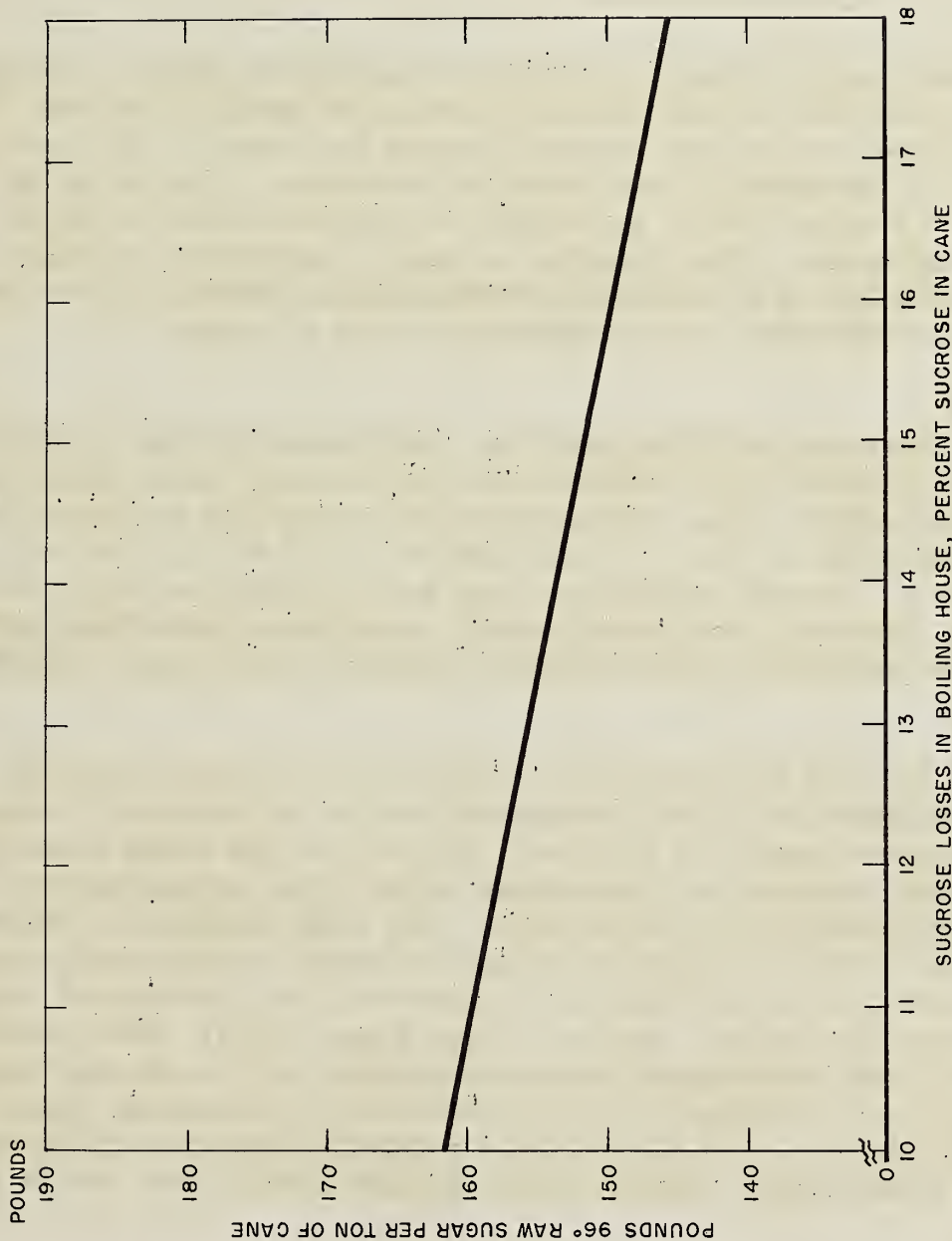
VARIATIONS IN RAW SUGAR RECOVERY PER TON OF CANE AND PERCENT
SUCROSE LOSSES IN BAGASSE, LOUISIANA, FACTORY AVERAGES BY
YEARS, 1947-1949



The factory averages of the sucrose losses in the bagasse varied from 8 to 16 percent 1/ and the resultant sugar recoveries ranged from 156.5 to 140.6 pounds, or approximately 2 pounds per 1 percent change in bagasse losses of sucrose, expressed as a percent of total sucrose in cane.

1/ There were a few isolated cases of bagasse losses below 8 percent and above 16 percent.

VARIATIONS IN RAW SUGAR RECOVERY PER TON OF CANE AND PERCENT SUCROSE LOSSES IN BOILING HOUSE, LOUISIANA, FACTORY AVERAGES BY YEARS, 1947-1949



The factory averages of sucrose losses in the boiling house varied from 10 to 18 percent ^{1/} and the resultant sugar recoveries ranged from 161.2 to 145.5 pounds, or about 2 pounds per 1 percent change in boiling house losses, expressed as a percent of total sucrose in cane.

^{1/} In several instances, sucrose losses in the boiling house ranged below 10 percent and above 18 percent.

PREPARATORY WORK TOWARD A UN CONFERENCE
FOR CONTROL OF TRADE IN SUGAR

By Catherine Corson Little *

The international Sugar Council concluded its meeting on July 20, 1950 ^{1/} by agreeing to circulate to Member Governments the working draft of a new International Sugar Agreement, prepared during the course of the meeting. It also adopted a resolution to meet again in November, after the draft has been studied, to decide whether to request the Secretary-General of the UN to convene a conference. The objective of such a conference, if called, would be the adoption of an agreement through which inter-governmental control would be exercised over international trade in sugar.

BACKGROUND

A new Sugar Agreement would supplant the "International Sugar Agreement regarding the Regulation of Production and Marketing of Sugar" signed at London on May 6, 1937. This Agreement is still moninally in effect, ^{2/} although Chapters III, IV, and V, which deal with the regulation of production, exports and stocks, have been inoperative since early in World War II. However, the Sugar Council, established under this Agreement, has been maintained and continues to keep the world sugar situation under review.

Sugar appears to meet the provisions of the Habana Charter regarding primary commodities for which international control of trade may, under exceptional circumstances, be justified. Its price on the world market is subject to sudden and extreme fluctuations, which have serious adverse effects on both producers and consumers. The chief suppliers of sugar to the world market are the tropical cane-growing areas, whose economics are largely dependent for stability and improvement on a stable and expanding world demand for sugar. Between World Wars I and II, these tropical areas suffered from increasingly severe competition with each other and with the protected sugar industries of the sugar-importing countries. During World War II, however, this situation was radically altered by the destruction of much of the sugar industry in the Eastern Hemisphere and in Europe.

*Adviser and Secretary to the US Delegation to the meeting of the International Sugar Council, June 26-July 20, 1950.

^{1/} This meeting was attended by representatives of the following Member Governments: South Africa, Australia, Belgium, Brazil, Cuba, Czechoslovakia, Dominican Republic, France, Haiti, Indonesia, the Netherlands, Peru, the Republic of the Philippines, Poland, Portugal, United Kingdom, United States of America, Yugoslavia. Observers were present from Canada, Colombia, Hungary, India, Israel, Italy, Mexico, Pakistan, the FAO and UN.
^{2/} The Council at this meeting adopted a Protocol extending the agreement one year from August 31, 1950.

Favorable market conditions led to renewed expansion of sugar production in such areas as the Caribbean. From the end of World War II to the outbreak of hostilities in Korea, the prospect of a burdensome surplus of sugar on the world market again appeared an imminent possibility as the sugar industries of the war-torn areas began to recover, and many countries undertook to restrict sugar imports. The Korean crisis has temporarily, at least, injected new activity into the world sugar market.

Convening on June 26, 1950 - just as the fighting broke out in Korea - most of the delegates to the International Sugar Council expressed the opinion that working out a new Agreement would be advisable. Some preliminary work toward this end had already been done. At the October 1949 meeting the Cuban Delegation had presented to the Council "Revised Draft Bases for a new International Sugar Agreement." These Bases did not represent any real departure from the principles set forth in the Agreement of 1937, though they would provide for more effective implementation in some respects. The USA had already expressed general approval of the principles of the Cuban Draft Bases and carried them one step further. The US Sugar Industry had prepared a Draft Agreement incorporating most of the Cuban proposals. This Industry Draft, adopted by the US Government after a few revisions, left in blank most provisions of a substantive nature for further discussion. In this form it was circulated to the Member Governments of the International Sugar Council and was ultimately accepted as a starting point for the drafting done by the Working Group during the latest meeting of the Council.

PRINCIPAL VIEWPOINTS

There were six fundamental Bases included in the Cuban Draft. These were studied by three Subcommittees set up by the Council. The Bases, and the general views expressed on them were as follows:

1. Regulation of Exports

All the delegations agreed that in a new International Sugar Agreement there should be regulation of exports to the world market by means of quotas adapted to market requirements. The delegations of four countries, however, took the position that certain minimum exports were essential to them and that they could not agree to reductions in their quotas below those levels.

2. Stabilization of Sugar Prices on the World Market

There was general approval, in principle, of including a provision to stabilize world sugar prices within a zone of maximum and minimum prices (yet to be defined), though one delegation did not believe that a single sugar price could be fixed for the whole world market.

3. A proper solution to the Currency Problem

All delegations agreed that unavailability of dollar exchange might at times distort the balance between supply and demand on the world sugar market. Most delegations approved including a provision to permit purchases above

quotas from soft-currency areas in certain cases of proved hardship. While admitting that this would not solve the problem of the dollar exporting areas, most delegations believed the currency problem would not be an absolute bar to an effective Agreement.

4. Limitation of Sugar Production by Importing Countries
There was no agreement among the importing countries concerning whether, or to what extent, they might obligate themselves to limit production in their own countries. Most delegations had not been given instructions by their Governments on this question. The US Delegation expressed willingness to apply some restrictions to expansion of its domestic production above current levels if other countries would do the same. However, two countries, which historically have been sugar importers, stated that their present goal was self-sufficiency. The UK Delegation said it would consider a proposal that some percent of the increase in its consumption above present levels be supplied by exporters to the world market, but pointed out that any such commitment must be consistent with the agreement recently concluded between the UK and the sugar-exporting areas of the Commonwealth.

5. Measure to increase consumption of sugar
There was agreement that, in the long run, expansion of sugar consumption offered the best means of overcoming disequilibrium in the world sugar market. Since price plays an important part in determining sugar consumption, it was considered important that sugar be made available to the world at the lowest prices consistent with the legitimate interests of producers. Recognizing that the price of sugar to consumers is influenced by national policy, most delegations agreed that reductions of internal barriers to sugar consumption should be undertaken, insofar as feasible in the light of such considerations as currency availability, the role of sugar in their internal economies, etc.

6. Treatment of Non-signatory Countries
It was recognized that this problem might not arise if all important exporters participated in an Agreement. However, it was also recognized that if such were not the case, it might become necessary to provide some means of preventing non-members from enjoying the benefits of an Agreement while not undertaking any of its responsibilities. It was emphasized, however, that no attempt should be made to compel participation. No specific recommendation for dealing with this problem was evolved. The delegation of one country stated that it could not agree to any special treatment of non-signatories.

POSITION OF THE US DELEGATION

In attempting to promote a new International Sugar Agreement to stabilize the world sugar market, the US Delegation made clear that the objective should be to make adequate supplies of sugar available at all times at prices equitable both to producers and consumers. Besides being consistent with general US policy of encouraging world trade, a stabilized world market is of interest to the US to the extent that it increases the stability of our own sugar-producing areas, of the exporting countries upon which we depend for our supplies, and of the world economy in general.

The US Delegation agrees with the general position taken at the Council meeting; that regulation of production and exports from exporting areas would be necessary. But it emphasized that such regulation alone would be ineffective in solving the underlying problems. Any real increase in stability in the world market must come about through expanded world consumption and imports of sugar. In support of this position the US Delegation urged the reduction of sugar prices paid by ultimate consumers to a level more consistent with world sugar prices, the elimination of barriers to international trade in sugar, and some limitation on expansion of sugar production in highly protected areas.

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